



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**  
Forms Designer

**Job Code Title**  
Editor

**Pay Band**  
05

**Job Code Number**  
273415

**Citizen Services and Resource Management Division**  
Citizen Services Bureau

**Fair Labor Standards Act**  
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Citizen Services Bureau operates the Call Center whereby citizens can call with questions, inquire about their tax accounts, and get the information needed to conduct business with the department; administers the One-Stop Licensing Program which is a one-stop shopping for businesses to register and renew their business licenses from numerous agencies participating in the program; advertises unclaimed property that has been turned over to the state in an effort to locate the rightful owners and processes claims for the return of the property; and coordinates the annual design of forms, tax returns, and instructions for administering taxes and licenses.

## **Job Responsibilities**

The Forms Designer designs and produces department forms for all tax types used by taxpayers and agency partners. The incumbent researches forms and forms technology for improved efficiency, simplification, and customer service; coordinates and facilitates individual forms updates and design projects; drafts, reviews, and edits documents; develops electronic forms and tools; coordinates print production; implements public information projects; and tests vendor-supplied forms and documents. The position reports to the Citizen Services Bureau Chief and does not supervise other staff.

### • **Forms Design 65%**

1. Coordinates and delivers forms design projects according to work plans and priorities. Coordinates project activities, provides updates to other staff and supervisors, and resolves technical and procedural problems related to forms design, production, dissemination, and evaluation.
2. Coordinates and facilitates workgroups to evaluate and recommend form structures, revisions, clarity, accuracy, consistency, and compliance. Communicates forms needs to printing vendors, software companies, other divisions, IT developers, and remittance scanning technicians.
3. Drafts, reviews, and edits forms, booklets, instructions, payment vouchers, and other documents to be easily understood by the public and in compliance with department writing requirements.
4. Develops and communicates specifications for forms and guidelines for reproduction of payment vouchers and scannable forms with printing vendors and software companies.

5. Coordinates the review and approval of forms and payment vouchers from printing vendors. Reviews any changes to forms and payment vouchers proofs. Coordinates end to end testing of payment vouchers and scannable forms which involves other department work units. Approves final proofs. Communicates with the printing vendors. The communication may include immediate approval of time-sensitive forms and payment vouchers as well as change requests with significant problems that may affect the printing vendor's production and final products.
  6. Analyzes computer-generated forms from software companies to ensure compliance with department policies and state tax laws. Coordinates the review, end to end testing which involves other department work units, correction requirements, and approval of payment vouchers and scannable forms. Identifies and resolves errors, discrepancies, and other problems through manual corrections or coordination with software companies on an ongoing basis.
  7. Develops electronic forms that include fill-in and self-calculating forms. Coordinates testing of these forms with other department work units and incorporates input from those units to resolve identified problems. Updates and corrects electronic versions of the forms on an ongoing basis and works with the department's website team to post new and updated forms to the website.
  8. Coordinates and implements public information strategies to apprise software vendors, tax preparers, and taxpayers of changes to forms and instructions. Resolves common problems and areas of confusion as the liaison between department work units, taxpayers, tax preparers, federal government entities, outside vendors, and software developers.
- **Program and Project Support Services 30%**
    1. Maintains an electronic forms repository to store current and archival documents. Ensures accessibility and organization of stored documents. Coordinates with the website update team to upload new or revised forms to ensure current versions are available online.
    2. Provides support to taxpayers and employees regarding forms and processing by responding to questions, providing technical assistance, and issuing notices and updates as necessary.
    3. Researches and compiles specialized reports as requested by supervisors.
    4. Reviews existing forms and coordinates updates on an annual basis with business experts.
  - **Other Duties as Assigned 5%**
    1. Performs other duties as assigned by the supervisor.

### **Job Requirements**

To perform successfully as a forms designer, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to visualize effects of form changes. Skills in critical thinking; training; multi-tasking; ensuring quality control; customer service; conflict resolution; researching, compiling, and analyzing data from multiple sources; following written and oral directions and instructions; and word processing, spreadsheet, and database applications are required. Incumbent is required to maintain accuracy and attention to detail; provide timely and effective written, verbal, and interpersonal communication; make logical decisions; build relationships with customers and vendors; and exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of print and online publishing and design principles; editorial standards; business communications; agency business processes; individual tax types; and project management.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in business administration, public administration, communications, or related field. No experience is required.
  - Experience in editing or forms technology including desktop publishing software is preferred.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. Work hours may exceed 40 hours per week from time to time. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (print): \_\_\_\_\_